SPS Admin

Users Guide

For video tutorials, samples, and templates, visit our:
Online Admin Resource Page.

For additional assistance, contact: StudentSuccessTech@RuffaloNL.com

Contents

SPS Admin Navigation and Planning

What do I need to do in order for my survey administration to start?

We strongly suggest, at minimum, you review the table of contents on the users guide (this document) and watch our video tutorial on our online admin resource page.

In order to begin your administration, the following must be completed (or sent to us at StudentSuccessTech@RuffaloNL.com):

1. **Survey recipient** file containing email address, first name and last name must be loaded.
2. **Invites and reminders** must be planned.
   a. If using SPS admin for invitations and reminders, you will need to setup email messages within the survey administration page. Email messages are sent on their scheduled send date at 9:00AM Central Time.
   b. If inviting your students locally, you will need to send a mail merge email containing the student's Personal URL or provide them with the Survey URL and their passcode.
3. **Survey Customization** (Optional)
   o Campus Defined Items: statements that may be rated for importance and satisfaction (125 character limit per question).
   o Campus Defined demographic question: multiple choice questions or statements that provide up to 15 options to select one response from (character restrictions: 109 characters per question and 50 characters per response).
   o A list of your specific programs/majors along with a four-digit numeric identifier
4. **Preview the survey** (using the Sample link within your admin page)

Video Tutorials and Templates

How do I start or end my survey?

Once you have completed steps 1-4 noted above, you are all set to launch. If using SPS Admin for your invitations, your scheduled emails will launch as scheduled starting your survey. If you are administering the survey locally, your survey will start as soon as you send out the survey links.

Your survey will close at 12:00 AM on its End Date. You can easily change your end date in Dashboard – View/Edit Admin section of your administration page or by contacting StudentSuccessTech@RuffaloNL.com with your updated end date.

What completion rate should I aim for using your best practices?

The average response rate is about 20%. However, we typically see between 10-30%. We recommend each institution aim for at least 15%. However, you should also consider the size of your institution and how many students you are selecting to survey. If only a few hundred students will be asked to take the survey, you should hope for a high response rate.

We have a variety of resources and suggestions for a successful online administration which can be found on our Website: https://client.RuffaloNL.com/OnlineAdminResources. We encourage you to review these resources and to contact us if you would like to brainstorm additional options to boost your response rates.

How do I navigate SPS admin?

Logging in: To access the SPS administration page, log In at our website, https://Client.ruffalonl.com/myRuffaloNL, and access your myRuffaloNL account. Once logged in, select Satisfaction Priorities Survey from the box titled myApplications.

SPS Admin
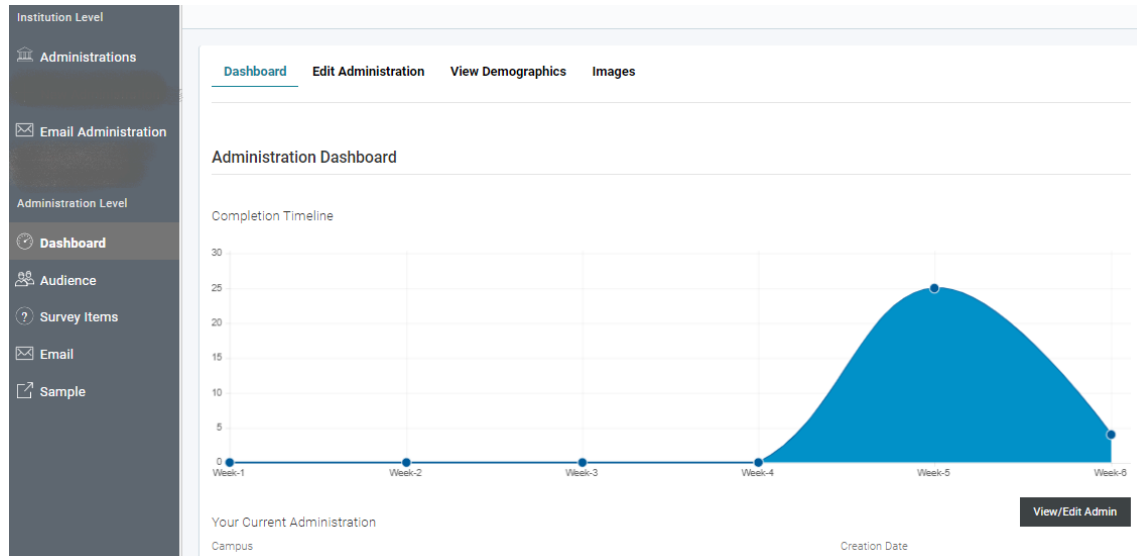
Administration

Allows you to select the survey administration you wish to view. Notice the toggle option at the top to see previously "closed" survey administrations as well.

Email Administration

Allows you to modify previously saved email templates or create templates to be used in your upcoming survey campaigns.

Remember, Email setup is complete within your survey administration under the Email section. Previously created templates will be available for selection as you proceed through the survey setup. You will be required to enter a send date as you setup your email messages.

Dashboard

Your Dashboard is quick overview of your account. You will find the end date, scheduled emails, Survey Specific URL, and completion counts are all reflected here. As your survey activity gets underway, the completion count will populate and a line graph will present a visual display of the activity.

Your survey will close at 12:00 a.m. on the date listed.

View/Edit Administration: The Edit Administration button has:

- End Date: you can change your survey end date
- Survey greeting line: this is the first line on the survey entry page – note, merge fields do not work on this page.

- Survey introduction: this is the paragraph on the survey entry page – note, merge fields do not work on this page.
- **Survey Specific URL:** this link used in conjunction with a passcode will grant student access to the survey
- Sample Survey Link: this link may be shared for testing purposes, but remember, this link will not capture responses
- Passcode Instruction text: this allows you to add instructional text to the passcode entry page (if using the Survey Specific URL noted above). As an example, you could add, please enter your student ID as passcode.

View Demographics: As your survey activity gets underway, the demographic count will populate. This information is reflected in real-time.

Images: Allows you to upload one logo. The logo will appear on your survey page and can be used in your email messages. The image works best when it has a height of about 250 pixels (jpg or png file).

Audience

This section allows you to import a student**/individual** file, export a student**/individual** list (most commonly **used to access the** completed student**/individual** records) or create anonymous passcodes (not assigned to any specific survey recipients)

Import: The Import – Import Recipients button allows you to upload a student/individual file. The file must be in this exact order as the template and your header row must exactly match.

Unassigned Passcodes: The Unassigned Passcodes button allows you to create anonymous passcodes that are not assigned to any individuals. These passcodes can be used to distribute locally with the standard survey URL of: https://survey.ruffalonl.com or your Survey Specific URL.

Survey Items

Survey Items allow you to add/edit/remove your satisfaction/importance items, demographics items, or program/majors. Using the check boxes at the top of the page, you can view all survey items or you campus specific items.

Add New: Allows you to individually add your satisfaction/importance items, demographic items, or majors.

Import Questions: Allows you upload your importance/satisfaction items or your program/major file. Templates are available for both uploads

Email

Allows you to setup email messages to be sent to your survey recipients. There is no additional costs to use this tool or for setting up any number of email messages. Sample email text can be found attached to your confirmation email or by using the email wizard within the Email button at your administration page. The bracketed items with your sample text are merge fields that will merge in the designated text when the email is sent.

Email Setup: Use the Email Setup button to create your email messages.

Sample

Allows you to sample the survey exactly as your survey recipients will see the survey.

Survey Recipients

How do I upload my survey recipient file?

[Video Tutorials and Templates](#)

To Import your file:

1. Select your specific survey administration from your list
2. Select the *Audience* button on the right
3. Select *Import*
4. Select *Import Recipients*
5. Browse to your survey recipient file
6. Select the *Import* button at the bottom of the screen

Your file will then come back with the number of successful records, duplicate records (already existing in your survey administration), or failed records.

Note, if you receive the error message below, you need to go back and make sure your file looks EXACTLY like the template above with the rows populated with the required information. If you have used the template and still receive an error, try download a new template and pasting only "values" into the spreadsheet.

Creating your survey recipient file

Start by downloading our template (found on our online admin page or within your admin page).

The file you create must be in this exact order and your header row must exactly match. If you are not uploading all the requested information, leave the header row intact but leave the column blank. Once your file is created, save as excel. An example of a file is:

	A	B	C	D	E	F	G
1	Passcode	Primary Email *	First Name *	Last Name *	Secondary Email	Student Id	PhoneNo
2		samplestudent1@RNL.com	Sample One First	Sample Last	ss@gmail.com		
3		samplestudent2@RNL.com	Sample Two First	Sample Last			
4		samplestudent3@RNL.com	Sample Three First	Sample Last		123456	3335556666

- The items noted with '*' are required.

- Passcode: If you plan on distributing the survey specific URL, you could potentially use email address or StudentID as passcode. If you are not uploading a passcode, a random passcode will be assigned to each individual, but they will simply use their personal URL to take the survey.

- Secondary email: if uploaded, emails will be sent to both the primary and secondary email.

- Student ID: allows you to upload your student's ID. This allows you to easily match back your local student data with your raw data (if purchased).

- PhoneNO: allows you to upload the students phone number. If you wanted, you could export the student file with URL and send a text locally (at your institution), through your texting services. Most institutions leave this field blank (just leave the header)

Upload Errors

Once your file upload is complete, you should see the number of valid, invalid and duplicated records. If clicked on, those counts should open an Excel file that provides more detail on the error that was encountered.

Once you have found your error, correct the error and re-load (just the errors). However, if you happen to re-load your entire file, don't worry. The system will recognize the existing students (based on email address) and kick out the second set as 'duplicates'.

If you want to 'delete' your entire upload and start again. Click on the "Back to Import History" button. Here you can delete your entire upload and start again.

Decoding Error Messages:

- *Duplicate passcode found*: this means the passcode you assigned to this recipient is either existing elsewhere in your file.
- *Duplicate Primary email found*: this means that email address already exists in this survey administration.
- *Invalid Email Format*: this means the format of your email was not a standard format (most likely it contains a space). We suggest starting by doing a 'replace all' function in Excel and do a space replaced with nothing.
- *Missing name value*: this means a first or last name are missing for the designated recipient.
- *Missing email*; this means the recipients' record was missing an email address.

Can I download my list of survey recipients?

After uploading your students, you can "Export Recipients" at any time. This function can be used throughout the duration of your survey administration. The "Personal URL" field can be provided to your students. You can select which list you would like to export:

- All: list includes ALL survey recipients
- Completed: list includes only Completed survey recipients
- Incomplete: list includes both not start and start but not started survey recipients
- Start but Not Completed: list includes only survey recipients have started the survey but not finished (partial responses are not included in your results)

I don't want to upload a recipient file, what can I do?

If you don't want to upload a recipient file, that is fine. Instead, you can generate random passcodes and distribute them locally to your students with your survey specific URL (found on the DASHBOARD). Or you can distribute the Personal URL links locally (this can be used on your portal or sent via a mail merge on your campus). The key is that each student needs either their unique passcode or their unique URL.

To generate random passcodes:

1. Select your specific survey administration from your list
2. Select the *Audience* button on the right
3. Select *Passcode*
4. Select *Create Passcodes*
5. Type in the number of passcodes you need and select *Create*
6. This should prompt a ribbon at the bottom of your screen, you can then open or save the file. The passcodes included in the file can be used with the standard Survey URL. Or the Personal URL found in the file can be distributed locally to the survey recipients (note, each recipient needs their own link if using the personal URL).

Inviting Survey Recipients

What link do my students need to access the survey?

If you are sending emails from the RNL survey administration page, you want to make sure the merge field of: {{surveylink}} is in your messages. This will ensure when your survey recipients receive their message, they will receive their personal URL link to the survey (no passcode is needed as it's included in the personal URL link).

This same Personal URL link is available in the "EXPORT RECIPIENTS" button of the Audience section of your admin page. You can export the file and use that link to send a mail merge locally.

If you are looking to do a local survey administration (without sending emails), your students can use the Survey Specific URL (found on your DASHBOARD → View/Edit Admin) in conjunction with a unique passcode that you assign to each student. If you want to create a QR code for your Survey Specific URL, you are welcome to. Just remember, each student will still need to enter their unique passcode to enter the survey.

How do I create a QR code?

The key with using the QR (or doing any local implementation), is to upload a passcode in your Survey Recipient File. Our suggestion is to use ID or email address in the passcode column. If the passcode is uploaded, you are 90% of the way there.

You will want to create your QR code using the Survey Specific URL (found on the Dashboard → View or Edit Admin of your SPS application). **RNL does not generate QR codes.** You or your marketing team will be responsible for this. There are lots of ways to create QR codes. We found that within Chrome, once on the page you would like to have a QR code for, if you go to the three vertical dots, you can find "cast, save, and share". Within that dropdown there is an option to create a QR code.

We would suggest you "Add Passcode Instruction Text" to direct students on what their passcode is when using the Survey Specific URL.

How do I send out survey invitation emails locally?

If you are administering your survey locally (either via lab, email or whatever other forum), you will want to send out one (or both) of the following:

- the personal URL link (found on the Audience –Export Recipients Link)

- the survey specific URL (found on your DASHBOARD) in conjunction with a unique passcode that you assign to each student

If you are planning to send the personal URL link via email, you will need to do a mail merge. If you are unfamiliar with mail merge, it's fairly simple to execute from Microsoft Word. A colleague may have more experience with sending messages this way or feel free to review Microsoft's Tutorial. Basic steps are:

1. Prepare your email message (in Microsoft Word)
2. Download and save your list of survey recipients (SPS Admin → Audience → Export Recipients)
3. In Microsoft Word, select the "Mailings" tab
4. On Mailing tab, Select "Start Mail Merge" button – E-mail Message
5. On Mailing tab, Select "Select Recipients" button, "Use an Existing List" and find the survey recipient list downloaded in step 2
6. On Mailing tab, Use "Insert Merge Field" button to merge in the students "Personal URL" and name (optional)
7. On Mailing tab, Select "Preview Results" to confirm your merge fields are looking as expected
8. On Mailing tab, Select "Finish & Merge" and "Send Email Message"
9. Populate "To" with "Primary Email"
10. Populate "Subject Line"
11. Select "Ok"

How do I setup emails within SPS admin?

Video Tutorials and Templates

1. Select your specific survey administration from your list
2. Select the *Email* button on the right (NOT Email Administration)
3. Select *Email Setup*
4. Go through the prompts
    a. Select your email type: either an invitation or a reminder message
    b. Select your template: based on who your audience is
    c. Populate the required information on the 'heading'
        i. From name: The name or department the email will appear to be coming from
        ii. Reply to email: The email address replies from survey takers would be routed to should they click reply.
        iii. Subject: Note in the templates the merge field for first name will appear. If needed, the merge field is: {{firstname}}
        iv. Scheduled transmission date: the date you would like your email sent (messages are typically sent at 9:00 a.m. CST (with a little variance based on the day's email volume)
5. Select Next

6. This should bring up the body of the message. A template will appear, but feel free to modify as you would like.
    a. Note, if you are copying and pasting a message from word, you might need to first copy the message into a notebook that removes all the word formatting. Once copied from the notepad, you can paste into the body of the message.
    b. If you use the **Insert Merge Field** button, once your email is sent, the email will be personalized with those fields.
7. Select Next
8. Determine if you want to save your updated text as a template for this administration or for another administration.
    a. If you do, select the box
        i. Then populate the 'name of the template' for your reference and later use.
        ii. Select Next
    b. If you do not, select Next
9. Review your email details and select Schedule Email

Can I see a sample or modify my email messages?

Sample Email Message: Once your email is set up within SPS admin, you can send yourself (or others) a sample of the email. To send a sample, it's as simple as selecting the envelope *icon* ✉ found on the far right under your Email section. (Note the link you receive in your sample message is the 'sample survey link'.)

Edit Email Message: Once your email is set up within SPS admin, you select the paper and pencil icon found on the far right of your email message. Proceed through the prompts, making any necessary changes, and select "Schedule Email" and your changes will be saved.

## When and how are my emails sent?

Emails are sent on their scheduled send date. Typically, at 9:00 AM Central Time.

Emails are sent with a sender email address of StudentSuccessTech@RuffaloNL.com. If you plan on sending email invitations to your survey recipients using the institutional email address, our suggestion is to notify your IT department the dates emails will be sent and the sender email address. More information can be found on the Whitelisting document on our online admin resource page.

Can I use my logo or an image?

Within the SPS administration page (Dashboard → Images (at the top)), you can upload one image. This image will appear on the entry page, on the top banner of each survey page, and can be used in your email messages. The image works best when it has a height of about 250 pixels (jpg or png file). The system will adjust the image size to fit the space available.

Once uploaded, you can insert the image in your email message by using the merge field of {{logo}}.
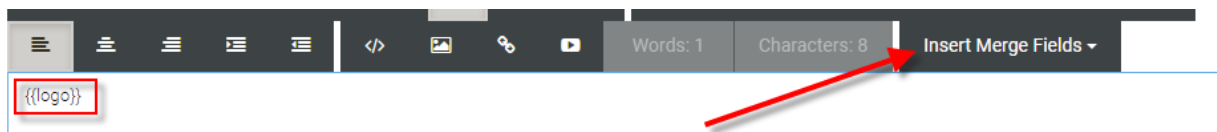
With that said, a common problem is the image will not load once you receive the email message (send yourself a sample of the email message). This occurs because the image is hosted by an outside vendor and without allowing the image to load, it won't automatically display.

A better solution for adding images (signatures, logos, pictures) to your email messages is for you to host the images. You may need to work with your marketing team to host the image. Once the image is hosted (by your institution), you will receive a URL. The URL can be inserted using the insert image icon with the email setup tool. Once inserted, your image will appear.
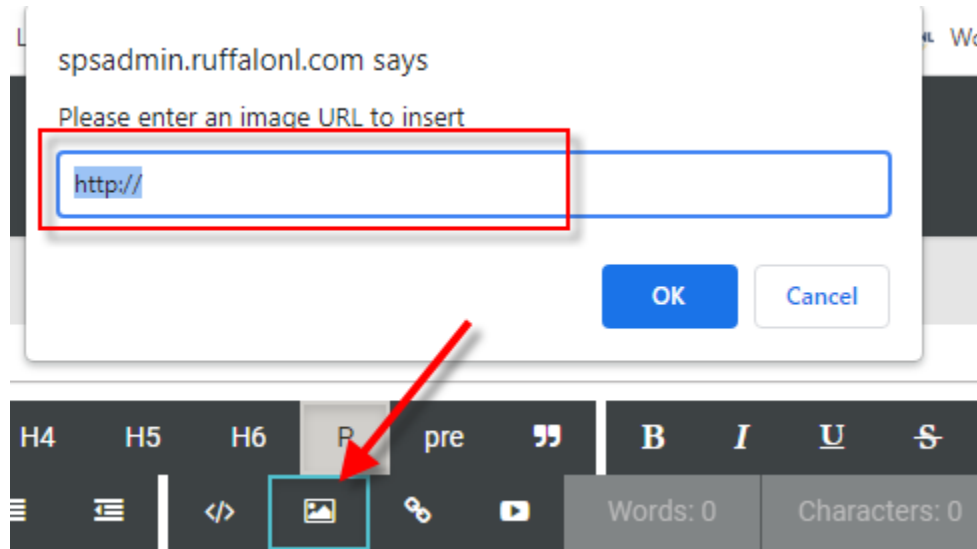
Survey Customization

You have three ways to customize your survey. They are:

1. Importance/Satisfaction Items: 10 statements (20 for ASPS) that may be rated on satisfaction and importance (125 character limit per question). Contact Shannon.cook@Ruffalonl.com for examples.
2. Campus Defined demographic question: 2 multiple choice questions or statements that provide up to 15 options to select one response from (character restrictions: 109 characters per question and 40 characters per response). Contact Shannon.cook@Ruffalonl.com for examples.
3. A list of your specific programs/majors along with a four-digit numeric identifier: An unlimited list of your specific programs/majors with a four digit numeric identifier.

Video Tutorials and Templates

How do I add my list of program/majors?

Under the *Survey Items* section of your administration page, you can add or edit a list of the program/majors you offer on campus. This will allow you to slice your data by majors when review reports.

Upload an Excel file with Program/Majors

1. Select Survey Items from the menu on the left
2. Select Import Question in the upper right corner
3. Make sure Import Program/Majors Questions is checked at the top

4. Browse to your saved excel file of majors

5. Select Import at the bottom on the screen
   a. Note, if you entire file does not load. Please update your file to meet the requirements (header row, 4 digit numeric code, and program/major name).

Create your program/major file (if you haven't done so already).

Start by downloading our template (found on our online admin page or within your admin page).

The file you create must be in this exact order and your header row must exactly match. An example of a file is:

	A	B
1	**4 Digit Code***	**Program/Major***
2	1001	Accounting
3	1002	Elementary Education

- 4 Digit Code: this must be a four-digit numeric code. If you don't have a numeric code, start with 1001 and give each one a unique code.
- Program/Major: this is field your students will see when completing the survey

Note, if you need to download the current majors loaded in your account select "Export Custom Questions" and you can copy the previously loaded majors.

Minor edits to your list of Program/Majors

If you have just minor edits to your existing list of majors, you can use the paper and pencil icon found on the right (under Survey Items).

How do I add my Campus-Defined Importance/Satisfaction Items?

Under the *Survey Items* section of your administration page you can add/edit/import the customizable portions of your survey.

Importance/Satisfaction Items are 10 statements (20 for ASPS) that may be rated for a level of importance and satisfaction (125 character limit including spaces per question).

Upload an Excel file with campus-defined items

1. Select Survey Items from the menu on the left
2. Select Import Question in the upper right corner
3. Make sure Import Importance/Satisfaction Questions is checked at the top

◉ Import Importance/Satisfaction Questions

4. Browse to your saved excel file of campus-defined items
5. Select Import at the bottom on the screen
   a. Note, if you entire file does not load. Please update your file to make sure it fits within the parameters and re-load the entire file.

Create your campus-defined items file.

Start by downloading our template (found on our online admin page or within your admin page).

The file you create must be in this exact order and your header row must exactly match (125 character limit including spaces). An example of a file is:

	A
1	**Importance/Satisfaction Item***
2	The Student Support staff are helpful.

If you want to **edit** existing items (without uploading a file):

1. Select Survey Items from the menu on the left
2. Select the edit icon (✎) or click on the actual item on the Importance/Satisfaction item you wish to edit.
3. Modify the 'title' (the text as you would like it to appear on the survey) as needed.
4. Select Save

If you want to **add** a new item (without uploading a file):

1. Select Survey Items from the menu on the left
2. Select Add New in the upper right corner
3. Select Importance/Satisfaction from the Survey Item Type dropdown
4. Enter you Title (the text as you would like it to appear on the survey)
5. Select Save

How do I add my Campus-Defined Demographic questions?

Under the *Survey Items* section of your administration page, you can add up to two demographic questions. This will allow you to slice your data by the demographic questions you add.

You may have up to two Campus Defined demographic question. The questions must be multiple choice questions or statements that provide up to 15 options to select one response from (character restrictions: 109 characters per question and 50 characters for responses). You are not required to use all possible responses. For example, you can ask a Yes/No question with just two options.

If you want to edit existing items:

1. Select Survey Items from the menu on the left
2. Select the edit icon (✎) or click on the Demographic item you wish to edit.
3. Modify the 'title' (the text as you would like it to appear on the survey) and answers as needed.
   a. Note, if additional answers are needed, select Add an Answer. And if answers need removed, select Delete.
4. Select Save

If you want to add a new item:

1. Select Survey Items from the menu on the left
2. Select Add New in the upper right corner
3. Select Demographic from the Survey Item Type dropdown
5. Enter the 'title' (the text as you would like it to appear on the survey) and answers as needed.
   a. Note, if additional answers are needed, select Add an Answer. And if answers need removed, select Delete.
4. Select Save

After Survey Launch

Who will receive the reminder email messages?

Only those students who have not completed the survey and whose status has not been changed to 'opt-out' of the survey will receive reminder messages.

How do I read the email statistics on my admin page?

The email statistics are deceiving on your administration page. Your emails were sent as indicated. They simply stay in the 'sent' portion until we receive information back from our email provider that they were successfully sent or failed. This information transfer can take some time depending on the number of emails we sent that day/week.

Good news is, they were all sent as indicated. When calculating your "sent" messages, include both the "sent" and "success" column.

If you **received fails,** your next step is dependent on the fail or bounce back message you received. after a bounce occurs for a recipient email address, Mandrill (our email provider) stops attempting delivery of the email. Further email to that address will be rejected temporarily. Bounces are undeliverable emails. They are usually separated into two categories: hard bounces and soft bounces. Mandrill uses a specific set of heuristics to determine whether a bounce should be classified as hard or soft. Typically, permanent errors like non-existent mailboxes will get classified as hard bounces, while quota errors and other temporary issues are treated as soft bounces.

If it failed/bounced because the email is bad, you can simply adjust the survey recipients email address; see the section titled 'Can I change a survey recipient's information once the file has been uploaded?' for more detail related to this.

Student link not working or wasn't received?

If the student received a link and they are indicating it does not work, have them try copying and pasting the link. That usually resolves the issue. If that doesn't work, try having the student send the link to you and you try the link.

If that doesn't work or the student didn't receive their email, you can send the student the standard survey link and their passcode. The standard survey link is https://survey.ruffaloNL.com and you may access their passcode by:

1. Selecting your survey administration
2. Selecting Audience
3. Searching for the desired student
4. Copy and paste the passcode listed

Can recipients 'opt out' of the survey?

Yes, they can, but it requires you to login and manually change their status. This can be done by:

1. Click on the Audience link on the left-hand menu (recipients should already be highlighted)
2. Find the survey recipient in the list (there is a search function at the top)
3. Select the 'Edit' link on the far right of their record
4. Select the 'Opt-Out' button found at the bottom

Once the Opt-Out function has been selected, the survey recipient will no longer receive additional notification or reminders from our system to complete the survey.

Can I change a survey recipient's information?

Yes, you can but it require you to login and manually change their record. This can be done by:

1. Click on the Audience link on the left hand menu (recipients should already be highlighted)
2. Find the survey recipient in the list (there is a search function at the top)
3. Select the 'Edit' link on the far right of their record
4. Change the needed information

Can a survey recipient re-take the survey?

Responses are saved every ten selections within the survey. If a student leaves the survey and comes back, they will pick up at the last saved point.

If a student has completed the survey and comes back to the survey, they receive the following prompt. If they proceed through the prompt, their previous responses will be over-written.

Do you wish to retake the survey?

First Name, you completed the Survey Type   for   Institution
        on Date.

By selecting "Yes, retake" all your previous survey responses will be removed, and you will need to complete the survey in full again.

Do you want to retake?

Yes, retake   No, keep what is already submitted

After Your Survey has closed

What do I need to do once my survey has closed?

Your survey will automatically close at 12:00 a.m. (midnight) on your scheduled end date. Results are typically delivered 10-15 business days from the close date of your online administration (or after we receive confirmation that we should proceed with closing – see note below). When your results are ready, you will receive an email notification with instruction on how to login to the RNL SmartView portal to access your reports.

If your completion rate is above 20%, no additional action is needed on your part. We will automatically proceed with closing your account.

If you completion rate is below 20%, look for an email from StudentSuccessTech@RuffaloNL.com requesting confirmation that you would in fact like to proceed with closing. (The 20% rate is the average response rate for online administrations and it is a good target to strive for). At that point, you can either re-open and do additional outreach (via email or something local) or proceed with closing. If you want to proceed with closing, simply respond to the email indicating that you would like to proceed with closing.

Can I download a list of completed survey recipients?

Yes, you can download list of survey recipients. You can download those who have completed the survey.

1. Login at https://client.ruffaloNL.com
2. Select Satisfaction Priorities Web Survey from the myApplications link
3. Select your survey administration from the list (if your survey has closed, you will need to change the option to closed)
4. Click on the Audience link on the left hand menu (recipients should already be highlighted)
5. Set your filter to your appropriate population (All, Completed, Incomplete)

Complete Status ⓘ   ◯ All   ⦿ Completed   ◯ Incomplete

Email Opt-out ⓘ   ⦿ All   ◯ Yes   ◯ No

6. Select Export Recipients
7. You will be prompted to open or save your Excel file.

How do I select winners for our incentive?

You can select your winners in two ways:

1. After the close of your administration, send a note to StudentSuccessTech@RuffaloNL.com to select the indicated number of winners from your survey administration and we will select the winners for you and provide the names to you via email.
2. Pull the list of individuals who have completed the survey and select your winner. See previous question.